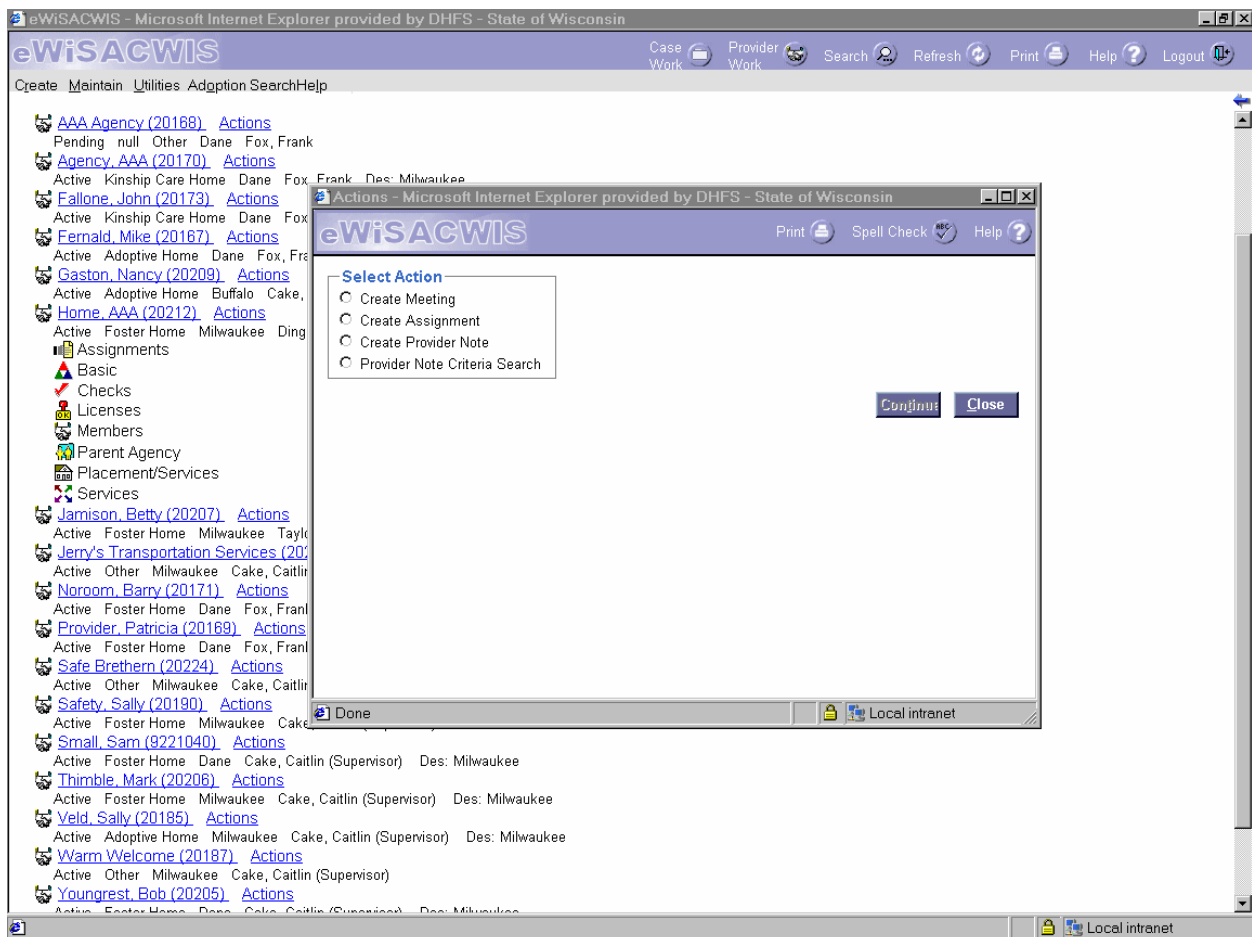


CREATING AND REVIEWING PROVIDER NOTES

CREATING A PROVIDER NOTE FOR A PROVIDER TO WHICH YOU HAVE AN ASSIGNMENT

1. Click on the Provider Expando to view all providers to which you have an assignment. Scroll to the provider in which you would like to create a provider note. Click on the Actions hyperlink next to the provider name. This will open the Actions Window.
2. Click on the Create Provider Note radio button. Click on Continue. This opens the Provider Note window



- At the top of the window are the 'Worker Creating Note' and 'Worker Making Contact' fields. There is a search link adjacent to the 'Worker Making Contact' field, which the worker creating the note can click to search the name of the worker who actually made contact with the participant(s). The worker name appearing on the provider outliner will populate as the name of the 'Worker Making Contact'.

The Note Finalized check box will freeze the note once the box is checked. If the box is not checked, the note remains editable by the worker creating the note for 30 days after creation. Upon the 30th day, the note will automatically freeze.

Enter the appropriate date and time. Select the Category and Type. If this is billable time, check the billable box and enter the units. Enter text of the note in the narrative section.

- When completed with the Narrative section, click on Spell Check at the top of the window to Spell Check your work. When finished with Spell Check, click on the save button.
- Click on the Close button to return to the outliner.

The screenshot shows a web browser window titled "Provider Note - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The page has a purple header with the "eWiSACWIS" logo and navigation links for Print, Spell Check, and Help. The form contains the following fields and sections:

- Provider:** Abelman, Andrea
- Worker Creating Note:** Caitlin Cake
- Worker Making Contact:** Caitlin Cake [Search](#)
- Provider Note ID:**
- Date Entered:** 03/14/2006 11:47 AM
- ☒ **Note Finalized**
- Note Information Section:**
 - Date Occurred:** 09/14/2005 10:00 AM (radio buttons for AM/PM)
 - Category:** OHCU (dropdown menu)
 - Type:** Licensing (dropdown menu)
 - Units:** 0000.0
 - ☐ **Billable**
 - Check box if Yes** (label)
- Narrative Section:**
 - Provider Note 1/1
 - Enter Text Here! (large text area)
- Buttons:** Insert Correction Note, Clear Fields, Create, Save, Close

The browser's status bar at the bottom shows "Done" and "Trusted sites".

CREATING A PROVIDER NOTE FOR WHICH YOU DO NOT HAVE AN ASSIGNMENT

1. Open the Search window and search out the Provider in which you want to create a provider note.
2. Click on the Actions hyperlink next to the provider name. This will open the Actions window. Click on the Create Provider Note radio button. Click on the Continue button. This will open the Provider Note window.
3. Enter the appropriate date and time. Enter the appropriate date and time. Select the Category and Type. If this is billable time, check the billable box and enter the units. Enter text of the note in the narrative section.
4. When completed with the Narrative section, click on Spell Check at the top of the window to Spell Check your work. When finished with Spell Check, click on the save button.
5. Click on the Close button to return to the outliner.

REVIEWING NOTES

1. Click on the Providers expando to view Providers. Click on the provider in which you want to review notes.
2. Expand the provider to view the Narrative Icon. Click on the Narrative Icon to view all notes on the provider.
3. Click on the hyperlink for the note that you would like to review.

Note: If you do not have an assignment to the provider, search out the provider from the search window, and expand the provider to see all the icons. All notes for the provider will be under the Narrative Icon.